

This market research synthesizes competitive dynamics, TAM and a Korean-focused growth opportunity.

# IV Infusion Market Research Brief

## Anne Arundel / Baltimore Region

The local IV infusion market is fragmented between hospital-based medical necessity and med spa-style lifestyle hydration, with no provider owning the middle ground: *clinically credible, outcome-specific IV therapy that is accessible, transparent, and culturally inclusive.*

A defensible opportunity exists to build a **medical-lifestyle hybrid IV brand**, with a clear pricing sweet spot (\$195–\$245), outcome-driven service menus, and a **Korean-first go-to-market strategy** that no competitor currently addresses.

## 1. Competitive Landscape Overview

### Hospital-Associated Infusion (UM BWMC)

- **Pricing model:** Insurance-driven; patient out-of-pocket varies widely (\$0–\$500+)
- **Positioning:** Medical necessity only; not marketed as wellness or hydration
- **Customer friction:** Referrals, scheduling delays, unpredictable cost
- **Market role:** Not a price or convenience competitor

**Takeaway:** Hospitals compete on clinical needs, not accessibility or lifestyle outcomes.

### Jean Walter Infusion Center

- **Pricing:**
  - Therapeutic infusions: insurance-based
  - Wellness-adjacent IVs: ~\$175–\$275
- **Positioning:** Medical, legitimate, limited lifestyle framing
- **Perception:** Neutral-to-premium, but not consumer-friendly

### Local Infusion (Private Clinic)

- **Pricing:**
  - Hydration / vitamin IVs: \$195–\$325
  - Add-ons: \$25–\$75
- **Positioning:** Clinical with comfort upgrades (private rooms, extended hours)
- **Perception:** Premium, justified by access and environment

## GlowRx IV Drip Bar & MedSpa

- **Pricing norms:**
  - Hydration: \$150–\$175
  - Myers / energy / immunity: \$200–\$275
  - Specialty blends: \$275–\$325
- **Positioning:** Lifestyle-oriented, accessible, not medically deep
- **Perception:** Consumer-friendly but low clinical credibility

## Concierge / MDVIP Practices

- **Pricing:**
  - Memberships: \$1,800–\$2,500+/year
  - IVs (ancillary): \$200–\$350
- **Positioning:** Preventive care, not transactional IV therapy
- **Perception:** High trust, high barrier, not scalable for IV-led growth

## 2. Service Menu Mapping: Market Gaps

Provider	Hydration	Vitamin IVs	Advanced/Rx	Lifestyle Framing
UM BWMC	✗	✗	✓ Strong	✗
Jean Walter	⚠ Limited	⚠ Limited	✓ Strong	✗
Local Infusion	✓	✓	✓	⚠ Clinical
GlowRx	✓ Strong	✓ Strong	✗	✓ Strong
Concierge / MDVIP	⚠	⚠	⚠	✗

**Key Gap Identified:** No provider owns “medically credible + lifestyle-accessible + outcome-specific IV therapy.”

## 3. TAM Snapshot

- **Target customers:**
  - Working professionals, shift workers, caregivers
  - Small business owners

- Wellness-oriented consumers seeking energy, recovery, and prevention
- **Price acceptance band:** \$150–\$300 per session (well-established locally)
- **Behavioral proof:**
  - High IV utilization in Korean-heavy metros (NY/NJ/LA)
  - Strong repeat behavior when outcomes are clearly framed
- **Revenue logic:**
  - 2–4 visits/month per member
  - Membership-driven LTV with predictable utilization

**Conclusion:** TAM supports a focused, high-repeat, mid-price IV brand with outcome clarity.

**Total Addressable Market Year 1:** \$1.2M-\$2.5M

## 4. Korean-Focused Market Opportunity

### Observed Market Reality

- All competitors are **English-only**
- No Korean landing pages, intake support, or culturally relevant messaging
- No presence on Korean platforms (KakaoTalk, Naver, community groups)

### Why This Matters Locally

- Significant Korean-American population in Anne Arundel / Baltimore
- Over-representation in:
  - Small business ownership
  - Shift-based work
  - Caregiving roles
- Cultural emphasis on:
  - Fatigue management
  - Liver health
  - Overwork recovery
  - Preventive wellness

### Competitive Gap

**Zero providers are intentionally serving Korean-speaking or Korean-first audiences.**  
This is the **niche**, not a translation exercise.

## 5. Recommended Pricing Sweet Spot

Offering	Price
Essential Hydration	\$165–\$175
Energy / Immunity	\$195–\$215
Performance / Recovery	\$225–\$245
Advanced Functional (NAD+, Liver, Burnout)	\$275–\$295
Membership (2–4/month)	10–15% savings

### Rationale

- Below premium private clinics → accessible
- Above med spa basics → credible
- Avoids hospital friction
- Aligns with established \$150–\$300 consumer expectations

## 6. Differentiation Strategy: What to Own

### Positioning

*Clinically guided IV therapy for real-life energy, recovery, and resilience.*

### Key Differentiators

- Outcome-based menus (not generic hydration)
  - Work Recovery
  - Burnout Reset
  - Hydration for Long Shifts
  - Liver & Metabolic Support
- Korean-first experience
  - Korean-language landing pages
  - Bilingual intake support
  - Cultural framing of fatigue and overwork

- Transparent, retail-style pricing
  - No insurance confusion
  - Clear expectations
- Medical credibility without hospital friction
  - Licensed providers
  - No referrals
  - Fast booking

## 7. Strategic White Space Summary

Dimension	Market Reality	Opportunity
Pricing	Fragmented \$150–\$300	Own \$195–\$245 core
Messaging	Generic hydration	Outcome-driven
Trust	Hospital vs spa	Medical-lifestyle hybrid
Accessibility	English-only	Korean-inclusive
Experience	Clinical or cosmetic	Purpose-built recovery

## Bottom Line

There is **no dominant IV infusion brand** in this market that is:

- Medically credible
- Lifestyle-accessible
- Outcome-specific
- Culturally inclusive

This creates a rare opportunity to build a **category-defining IV platform** with strong repeat economics and a defensible Korean-first growth wedge.